



**Department of Health Services  
Children's Medical Services Network**

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# **CMS Net Web E47 SAR and Provider Security Management Role Assignment Manual**

**Version 1.0  
User Manual**  
June 23, 2004

## Purpose of the Document

CMS Net Web provides the ability for certain authorized individuals to update “user roles” in CMS Net Web. “User-roles” describes the security level an individual has within a computer application.

- *For example, Joe Smith has the security level (Independent County) in CMS Net (the character-based system).*
- *Joe also has the security levels (SARADD and SARAUTH) in CMS Net Web (E47 Service Authorization and Provider Inquiry).*

This document explains how to update user roles in CMS Net Web (E47 Service Authorization and Provider Inquiry system). The ability to update user roles in CMS Net Web is reserved for individuals who are identified as System Administrators, Regional Office Administrators, and User Management in CMS Net Web.

To update user-roles in CMS Net (the character-based system), please call the CMS Net Help Desk.

## Overview of the User-Roles in CMS Net Web

Here is a list of the user-roles in CMS Net Web.

Security Level in CMS Net Web	Security Description
SAR Add	User can enter, modify and delete pending SAR.
SAR Authorize	User can authorize, deny, cancel, modify and extend SAR.
SAR Override	User can override business rules: <ul style="list-style-type: none"><li>• Age 21 restrictions</li><li>• End dated procedure codes</li><li>• Procedure codes with a pend/deny indicator of T or D</li><li>• One year limitation on SAR service dates</li><li>• Age 19 restrictions for orthodontia</li><li>• Length of stay at inpatient hospital</li><li>• Allowed to manually enter a National Drug Code (NDC) to pay for Brand Name drugs</li></ul> NOTE: Program and Client Eligibility can not be overridden.
SAR EPSDT-SS	User can approve EPSDT-SS and CCS SS authorizations for “Categories that Require State Approval”. Do not assign this security role without approval from the State CMS Branch. <ul style="list-style-type: none"><li>• Approve-Yes or Approve-No for EPSDT-SS and CCS-SS SAR</li><li>• Can enter a negotiated price for procedure codes that do not have a price on the procedure master file.</li></ul>

<b>Security Level in CMS Net Web</b>	<b>Security Description</b>
SAR County	User can change the client's legal county to "59" to pay 100% state funds. Do not assign this security role without approval from the State CMS Branch.
User Management	User can update security roles for other CMS Net Web users.
State Administrator	User is a System Administrator. This role is for CMS Net Help Desk staff only.
Regional Office Administrator	User is a Regional Office Administrator. <ul style="list-style-type: none"> <li>System administration role for dependent counties within the regional office</li> </ul>
Regional Office User	User is a Regional Office worker.
County User	User is a County worker. <ul style="list-style-type: none"> <li>View only access for independent or dependent county workers.</li> </ul>
Provider Management	User is member of Provider Services Unit (PSU) of the State CMS Branch. Provider management security role allows users to: <ul style="list-style-type: none"> <li>Add/Update paneling information</li> <li>Associate providers to SCC</li> <li>Approve Inpatient Hospitals</li> <li>Add/Update SCC</li> </ul>
Provider Approver	<i>NOT IN USE</i> User can approve provider management changes.
List Management	<i>NOT IN USE</i> User can update drop-down list values.

*Table 1: User Role Security Description*

## Users who can Update “User Roles” in CMS Net Web

Three types of users can update user roles in CMS Net Web:

- User Management
- Regional Office Administrator
- State Administrators

These user groups may update user-role information with the following restrictions.

### ***User Management***

The security level “user management” may be given to authorized individuals in an independent county.

Managing the “user management” responsibility at the county level requires tracking the security levels at an individual level (as described in Table 1: User Role Security Description). An individual may have two or more security levels in CMS Net Web. *For example an individual in a county may be given “SAR Add” and “SAR AUTH” security.*

### **Permissions for User Management**

- Individuals with “user management” security can update the security level for those *in their county only*.
- Individuals with “user management” security cannot give security levels “system administrator,” “regional office administrator,” or “user management” to other user.

### ***Regional Office Administrator***

The security level “regional office administrator” may be given to authorized individuals in a regional office.

Managing user-roles at the regional office level requires tracking the security levels at an individual level (as described in Table 1: User Role Security Description). An individual may have two or more security levels in CMS Net Web. *For example an individual may be given “SAR Add” and “SAR AUTH” security.*

### **Permissions for Regional Office Administrator**

- Individuals with “regional office administrator” security can update the security level for users within dependent counties of their region.
- Individuals with “regional office administrator” security cannot give security levels “system administrator,” “regional office administrator,” or “user management” to any user.

## **State Administrator**

The security level “system administrator” is reserved for CMS Net Help Desk staff.

Managing user-roles at the CMS Net Help Desk requires tracking the security levels at an individual level (as described in Table 1: User Role Security Description). An individual may have two or more security levels in CMS Net Web. *For example an individual may be given “SAR Add” and “SAR AUTH” security.*

### **Permissions for State Administrator**

- Individuals with “state administrator” security can update the security level for any user (providing the user has an existing access code in CMS Net).
- Individuals with “state administrator” security have *no* restrictions to disseminate “system administrator,” “regional office administrator,” or “user management” security levels.

## **Assumptions**

1. Individuals who have a user-role in CMS Net (character-based system) as of **6/26/04** in the production environment will have a user-role pre-defined in CMS Net Web (E47 Service Authorization and Provider Inquiry system).
2. For new users, the process to add new users in CMS Net (character-based system) will continue to be performed by the CMS Net Help Desk.
3. Updating user-roles in CMS Net Web requires an understanding of which individual should have which security levels (as described in Table 1: User Role Security Description).

# Step-by-Step Instructions on how to Update User-Roles in CMS Net Web

1. Login to CMS Net.



California Home CDHS Home CDHS Comments CDHS Search CDHS Organization Friday, May 21, 2004

Welcome to *California*

**Children's Medical Services**  
Caring for Children with Special Medical Needs...

Contact Us | Help

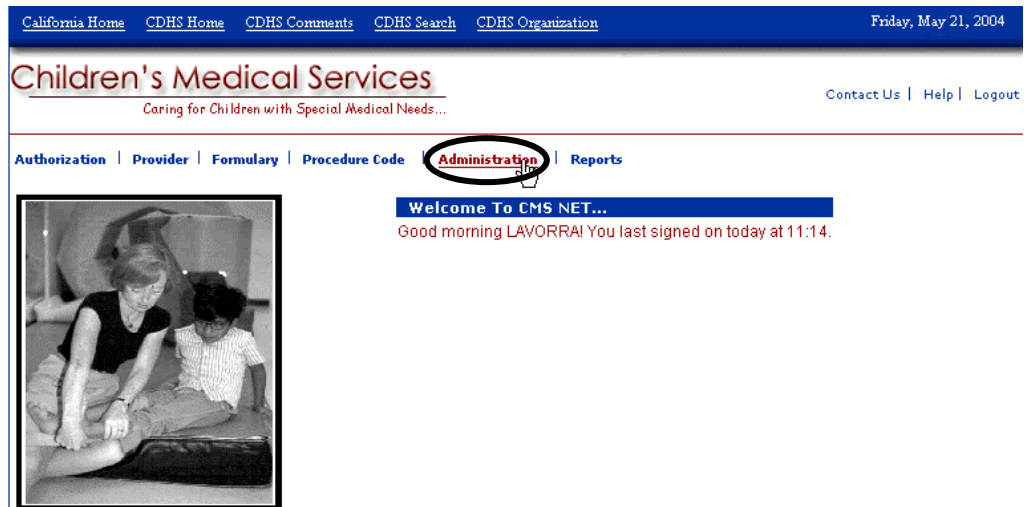
*The Children's Medical Services (CMS) Branch provides a comprehensive system of health care for children through preventive screening, diagnostic, treatment, rehabilitation, and follow-up services...*

*The CMS Branch carries out this mission through a variety of programs meeting specific health care needs of targeted population...*

**Login...**

Access Code: [masked]  
**Submit** **Clear**

2. Click the Administration Link.



California Home CDHS Home CDHS Comments CDHS Search CDHS Organization Friday, May 21, 2004

**Children's Medical Services**  
Caring for Children with Special Medical Needs...

Contact Us | Help | Logout

**Administration**

**Welcome To CMS NET...**  
Good morning LAVORRA! You last signed on today at 11:14.

3. Click “Security Maintenance” from the Administration Menu.

California Home | CDHS Home | CDHS Comments | CDHS Search | CDHS Organization | Friday, May 21, 2004

## Children's Medical Services

Caring for Children with Special Medical Needs...

Contact Us | Help | Logout

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

### Admin Security - General Guidelines

Please Select The Administration Screen you would like to view from the left navigation menu.

- ▶ SCC Team Requirements
- ▶ Service Code Maintenance
- ▶ Field Maintenance
- ▶ **Security Maintenance**

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4. The Security Maintenance page will open.

Enter the last name of the user whose security level you would like to update.  
Then click the “find” button.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

### Security Maintenance

Enter Last Name here. →

Role For: ASHIDA **find**

Select	Security Level	Security Description
<input type="checkbox"/>	Provider Management	User is part of provider management Team
<input type="checkbox"/>	Provider Approver	User can approve provider management changes
<input type="checkbox"/>	SAR Add	User can enter and delete authorizations
<input type="checkbox"/>	SAR Authorize	User can authorize, deny, cancel and extend authorizations
<input type="checkbox"/>	SAR Override	User can override business rules such as client eligibility period
<input type="checkbox"/>	SAR EPSDT-SS	User can enter EPSDT-SS & CCS SS authorizations
<input type="checkbox"/>	SAR County	User can change the clients legal county
<input type="checkbox"/>	User Management	User can update security roles for other CMS Net Users
<input type="checkbox"/>	List Management	User can update drop down box values
<input type="checkbox"/>	State Administrator	User is a state administrator
<input type="checkbox"/>	Regional Office Administrator	User is a regional office administrator
<input type="checkbox"/>	Regional Office User	User is a regional office worker.
<input type="checkbox"/>	County User	User is a county worker

Last Update Date: Last Update By:

**Save** **Clear**

5. Select the user name from the search results by clicking the Last Name.

Search Results - List of ASHIDA Names				
Lastname	Firstname	AccessCode	Region	County
ASHIDA	EMI	ASHIDA01		

6. Select by checking the checkboxes next to the security level.


To de-select a security level, click the checkbox again to remove the checkmark.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Security Maintenance

Role For

Select	Security Level	Security Description
<input type="checkbox"/>	Provider Management	User is part of provider management Team
<input type="checkbox"/>	Provider Approver	User can approve provider management changes
<input type="checkbox"/>	SAR Add	User can enter and delete authorizations
<input checked="" type="checkbox"/>	SAR Authorize	User can authorize, deny, cancel and extend authorizations
<input checked="" type="checkbox"/>	SAR Override	User can override business rules such as client eligibility period
<input type="checkbox"/>	SAR EPSDT-SS	User can enter EPSDT-SS & CCS SS authorizations
<input type="checkbox"/>	SAR County	User can change the clients legal county
<input type="checkbox"/>	User Management	User can update security roles for other CMS Net Users
<input type="checkbox"/>	List Management	User can update drop down box values
<input type="checkbox"/>	State Administrator	User is a state administrator
<input type="checkbox"/>	Regional Office Administrator	User is a regional office administrator
<input type="checkbox"/>	Regional Office User	User is a regional office worker.
<input type="checkbox"/>	County User	User is a county worker



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Last Update Date:2004-05-20

Last Update By: W007



7. Click the “Save” button to save the update.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

**Security Maintenance**

Role For:

Select	Security Level	Security Description
<input type="checkbox"/>	Provider Management	User is part of provider management Team
<input type="checkbox"/>	Provider Approver	User can approve provider management changes
<input type="checkbox"/>	SAR Add	User can enter and delete authorizations
<input checked="" type="checkbox"/>	SAR Authorize	User can authorize, deny, cancel and extend authorizations
<input checked="" type="checkbox"/>	SAR Override	User can override business rules such as client eligibility period
<input type="checkbox"/>	SAR EPSDT-SS	User can enter EPSDT-SS & CCS SS authorizations
<input type="checkbox"/>	SAR County	User can change the clients legal county
<input type="checkbox"/>	User Management	User can update security roles for other CMS Net Users
<input type="checkbox"/>	List Management	User can update drop down box values
<input type="checkbox"/>	State Administrator	User is a state administrator
<input type="checkbox"/>	Regional Office Administrator	User is a regional office administrator
<input type="checkbox"/>	Regional Office User	User is a regional office worker.
<input type="checkbox"/>	County User	User is a county worker

Last Update Date: 2004-05-20      Last Update By: W007

You are finished! To continue updating user-role information, you may type in the last name for the next individual (return to Step 4). Otherwise if you are finished, you may click the “Logout” link in the upper right-hand corner of the page to quit.

## For Users who are New to CMS Net and CMS Net Web

For users who are new to CMS Net and CMS Net Web, you may need to contact the CMS Net Help Desk (866) 685 – 8449 to establish an “access code” in CMS Net.

Once the “access code” has been established in CMS Net, the user-role may be established in CMS Net Web.

## Knowing that Updating User-Roles in CMS Net Web will not Update User-Roles in CMS Net

Updates to user-roles in CMS Net Web (E47 Service Authorization and Provider Inquiry system) will not affect nor update user-roles in CMS Net (character-based system).